



Retirement Plan Adviser Serving Small & Medium Sized Businesses

June 10, 2025



How We Help SHRM Members



Reduce Administrative Burden



Drive Employee Engagement



Navigate Plan Compliance & Legislation (like SECURE 2.0)



Increase Plan ROI by Increasing Performance & Decreasing Fees

Sponsor Services

		Fisher Solution
Dedicated Point-of-Contact	Provides a dedicated point-of-contact for all plan servicing needs	?
Ongoing Plan Administration	Meets with plan committee annually to review plan health metrics and discuss opportunities to improve plan performance	?
	Assists with payroll setup, training, and coordination	?
	Analyzes plan design	?
	Assists with employee notices, including delivery to the Plan Sponsor	?
	Proactively assists with former employees with a balance	?
Daily Plan Management	Assists with plan governance and reviews requirements under Section 404(c) of ERISA	?
	Creates and assists with fiduciary audit file	?
	Benchmarks plan provider services and fees with third party data to support ongoing due diligence	?
Compliance Testing	Provides annual support for IRS Form 5500 preparation and filing	?
	Provides ongoing support for annual compliance testing	?
	Liaises between plan providers to complete timely compliance testing, and provide ongoing tailored solutions for plan optimization	?
Vendor Management	Provides access to administrative fiduciary solutions, including 3(16)	?
	Supports ongoing service provider negotiation, monitoring, and evaluation	?
	Proactively advocates for best-for-client services and pricing with all plan service providers	?
Service Provider Transition	Facilitates seamless service provider transition with dedicated support during plan installation, ongoing, and as needed	?
	Attends all plan installation calls, and coordinates communication and work across all plan service providers	?

Visit Our Table

401(k) Plan Scorecard



\$200 Giftcard Raffle

